



27 March 2025

Market Updates:

Emerging Markets

Indices	Close	% Chg.
BSE SENSEX	77606.43	0.41%
S&P CNX Nifty	23591.95	0.45%
Shanghai	3362.32	-0.34%
Bovespa (Brazil)	133148.80	0.47%
Merval Index	2412082.00	-1.14%

Asian Markets

Nikkei 225	37007.75	-2.10%
Hang Seng	23546.18	-0.14%
Strait Times	3986.35	0.12%

U. S. Markets

Jones	42299.70	-0.37%
Nasdaq	17804.03	-0.53%
S&P 500	5693.31	-0.33%

European Markets

CAC 40	7990.11	-0.51%
DAX	22678.74	-0.70%
FTSE	8666.12	-0.27%

Indian Indices

Indices	Close	% Chg.
SENSEX Index	77606.43	0.41%
NIFTY Index	23591.95	0.45%
BSE MID Index	41817.03	0.46%
BSE SML Index	46803.65	0.90%
BSE 100 Index	24671.80	0.61%
BSE 200 Index	10645.41	0.61%
BSE 500 Index	33711.61	0.65%
CNX 100 Index	24145.05	0.64%
CNX MCAP Index	51839.40	0.37%
CNX 500 Index	21407.95	0.62%
BSE AUTO Index	48220.85	-0.99%
BANKEX Index	59329.02	0.67%
BSE CDR Index	54722.49	0.69%
BSE CAP Index	62817.33	0.51%
BSE FMC Index	19318.14	0.57%
BSE HEALTH Index	47917.79	0.11%
BSE IT Index	36773.36	0.40%
BSE MET Index	30959.33	0.54%
BSE OIL Index	25054.10	1.32%
BSE POW Index	6653.18	1.16%
BSE PSU Index	18200.85	1.36%
BSE REAL Index	6697.74	1.38%
BSE TECK Index	17594.39	0.18%
CNX BANK Index	51575.85	0.72%
CNX IT Index	37548.30	0.57%

Institutional Investors Net Position

27/03/25	Cash	F&O	Total
MFs	NA	NA	NA
FII	8121.0	-8652.9	-531.9
Total	8121.0	-8652.9	-531.9

Source – SEBI

FII & DII Activity on BSE & NSE (Cr.)

28/03/25	Buy	Sell	Net
DII Cash	16920	9274	7646
FII Cash *	11508	15861	-4353
FII F&O	1142160	1170180	-28019
Total	1170589	1195315	-24726

* Provisional Figures, Source – NSE

US Market

US stock market ended mixed on Monday amid uncertainty around the US President Donald Trump's economic agenda. The Dow Jones Industrial Average rallied 417.86 points, or 1%, to 42,001.76, while the S&P 500 gained 30.91 points, or 0.55%, to 5,611.85. The Nasdaq Composite closed 23.70 points, or 0.14%, lower at 17,299.29. For the quarter, the S&P 500 slumped 4.6%, while the Nasdaq Composite plummeted 10.5%, and the Dow Jones Industrial Average slipped 1.3%.

European Market

European markets traded sharply lower on Monday as global investors braced for U.S. President Donald Trump's trade tariffs to come into force. The regional Stoxx 600 index closed 1.51% lower, with nearly all sectors and major bourses firmly in negative territory. The final trading day of March marks the Stoxx 600's first losing month of the year, with a loss of nearly 3%, according to LSEG data. However, in 2025 so far the index continues to outperform the U.S. S&P 500, which is on course to drop more than 6% in March.

Asian Market

Asian markets traded higher on Tuesday as overnight gains in Wall Street lifted investor sentiment. Japan's Nikkei bounced back from a near eight-month low hit in the previous session, and was up 1%, while the Topix rallied 1.34%. South Korea's Kospi surged 1.03% while the Kosdaq gained 1.12%. Hong Kong's Hang Seng index futures indicated a stronger open.

Gift Nifty

Gift Nifty was trading around 23,455 level, a discount of nearly 182 points from the Nifty futures' previous close, indicating a gap-down start for the Indian stock market indices.

Market Outstanding OI in F&O Segment

F&O
Open Interest

Value (Crs.)	% Chg.
Index Futures	1048.9
Index Options	67365.9
Stock Futures	-284.4
Stock Options	6244.9
Total	74375.3

Exchange Rates	Current	% Change
US Dollar	85.58	-0.21
British Pound	110.74	-0.11
Euro	92.32	-0.13
Japanese Yen	56.75	-0.46

Bullion / Crude	Close	% Chg.
Gold	3071.24	0.46%
Silver	34.25	-0.48%
Brent Crude*	73.95	-0.11%
WTI Crude *	69.87	-0.07%

ADR Prices (\$)	Close	% Chg.
HDFC Bank	66.85	1.44
ICICI Bank	31.31	-0.29
Infosys Tech.	18.67	0.05
Dr. Reddys	13.27	-0.15
Wipro	3.13	0.97

Market Breadth (NSE)	
Advances	1086
Declines	1811
Same	55
Total	2952
A/D Ratio	0.6 : 1

Industry/Company News

- UltraTech Cement: The firm commissioned new capacity and expansion projects across multiple locations. This included a brownfield clinker capacity of 3.35 million tonnes per annum at its Madhya Pradesh plant, a brownfield grinding unit expansion of 1.2 MTPA in Maharashtra and another brownfield grinding unit expansion of 0.60 MTPA in West Bengal.
- Bharat Electronics: BEL received additional orders valued at Rs 1,385 crore since March 12, taking the total value of orders secured in the current financial year to Rs 18,415 crore.
- Infosys: The firm partnered with LKQ Europe to implement a unified, cloud-based digital platform for streamlining HR processes across 18 countries.
- Hindustan Aeronautics: HAL revised the value of its contract to supply 20 Light Combat Aircraft Mark 1 to the Indian Air Force from Rs 5,989.4 crore to Rs 6,542.2 crore due to a revision in the delivery schedule.
- Asian Paints: The company is establishing a chemical manufacturing facility in Dahej, Gujarat, for Rs 3,250 crore. The facility will handle vinyl acetate ethylene emulsion, vinyl acetate monomer and ethylene.
- BEML: The firm secured a Rs 405-crore contract from Bengaluru Metro Rail Corp. for the supply of standard gauge metro cars, along with personnel training and comprehensive maintenance for up to 15 years.
- Force Motors: The company was declared the L1 vendor for the supply of 2978 Force Gurkha light vehicles to the Indian Defence Forces. The order is for GS 4X4 800 kg Soft Top vehicles.
- Mazagon Dock Shipbuilders: The Defence Ministry has extended Biju George's additional responsibilities as chairperson and managing director by a month, effective April 1.
- Gravita India: Receives tax demand of Rs 41.48 crore.
- Antony Waste: Approves merger of AG Enviro Infra Projects.
- Power Finance Corp: Transfers Kurnool III PS RE Transmission project to Power Grid Corp.
- Jio Financial Services: To invest Rs 1,000 crore in Jio Finance for business operations.
- Aditya Birla Fashion: The NCLT approves scheme of arrangement with Aditya Birla Lifestyle Brands.
- CESC: Signs power purchase agreement for 25 MW capacity for three years.
- DCM Shriram: Begins commercial operations at compressed biogas plant in Ajbapur.
- Raymond: The NCLT approves the scheme of arrangement with Raymond Realty.
- UCO Bank: Closes QIP and approves issue price at Rs 34.27 per share.
- Samvardhana Motherson: Says US tariffs may not materially impact financials as products are US-made or USMCA-compliant.
- Adani Green Energy: Operationalises 396.7 MW power projects in Gujarat; total generation capacity rises to 13,487.8 MW.
- Piramal Enterprises: To raise up to Rs 100 crore with a green-shoe option of Rs 200 crore.
- One Mobikwik Systems: Updates on Dec. 14 fraud case, stating an ex-employee misappropriated up to Rs 1.26 crore.
- Torrent Power: Sells shares of various arms for Rs 467 crore to unit Torrent Green Energy.

Institutional Activity (Rs. in Crores)							
Date	FIIs			Mutual Funds			Total Net
	Purchase	Sales	Net	Purchase	Sales	Net	
27-Mar-25	28676.45	20555.49	8120.96	NA	NA	NA	8120.96
26-Mar-25	14453.03	11995.12	2457.91	NA	NA	NA	2457.91
25-Mar-25	19056.84	13358.1	5698.74	7827.52	12092.4	-4264.88	9963.62
24-Mar-25	18530.06	12324.56	6205.5	9080.04	10042.38	-962.34	7167.84
21-Mar-25	46532.47	41269.25	5263.22	13987.22	18542.41	-4555.19	9818.41
Total of Current Week	80716.38	58233.27	22483.11	16907.56	22134.78	-5227.22	27710.33
Total of Last Week	106520.93	102104.38	4416.55	50310.43	51745.87	-1435.44	5851.99
Total for Current Month	298911.92	290858.48	8053.44	152644.55	143149.50	9495.05	481.20
Total for Last month	293722.71	339025.87	-45303.16	226200.32	178266.51	47933.81	-93236.97
Year Upto Date	844165.28	954090.89	-109925.61	649745.89	534697.77	115048.12	-223050.92

FII Daily Trends in Derivative (Rs. in Crores)											
Details	Buy		Sell		NET	Current Open Interest		Previous Open Interest		NET	
	No. Of	Value	No. Of	Value		No. Of	Value	No. Of	Value	Value	% Change
	Contracts		Contracts			Contracts		Contracts			
Index Future	19101	3210	37553	6327	-3116	81772	13501	75332	12452	1049	8.4
Index Options	6124101	1067234	6247327	1086781	-19547	1067413	184782	677515	117416	67366	57.4
Stock Futures	309712	18488	352241	20826	-2337	2816579	171666	2800943	171950	-284	-0.2
Stock Options	852379	53228	912527	56246	-3019	275829	16198	168796	9953	6245	62.7
Total	7305293	1142160	7549648	1170180	-28019	4241592	386147	3722585	311771	74375	23.9

Market Turnover (Rs. Crores)			
	28/03/25	27/03/25	% Chg.
BSE	1285	6604	-80.54
NSE	104168	149837	-30.48
NSE F&O	17227576	34894313	-50.63
Total	17333029	35050754	-50.55

Volumes (Lacs Shares)			
	28/03/25	27/03/25	% Chg.
BSE	16.20	87.44	-81.47
NSE	43923	61654	-28.76
Total	43939	61741	-28.83

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